POSTS OF DUTY
(POD)
USER MANUAL
September 2001

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1.0   PROCESS SUMMARY OVERVIEW

The Posts of Duty Redistribution Program (POD) was designed to furnish approximately 500 IRS Walk-in offices with necessary publications for distribution to the public. About 270 of the 700-plus products are shipped from either contractors (Printers) or the ADCs each fall. In addition to the initial distribution to the Walk-in offices, additional products can be ordered and sent from each regional ADC.

The primary objectives of the POD System are:

- Maintain an accurate list of the Walk-in IRS offices that receive bulk products
- Distribute the survey to these locations
- Distribution of the Due-In Reports
- Maintain accurate information about the quantity and status of items requested and/or shipped to participating locations

For POD to achieve its objective the following functions are provided:

- Production, distribution, and updating of the Survey and Due-In Reports
- Production of statistical information of Quantities of Tax Products Distributed to the IRS Walk-in offices for TFMAP

Processing Summary

The Posts of Duty System is the means by which tax products are sent to the nearly 500 IRS Walk-in Offices. All offices are required to maintain a mandatory set of products that are shipped to them via Printing Contractors and/or their regional ADC. The mandatory products that are required to be stocked are listed on the IRS Electronic Publishing WEB site.

Based on the previous year's product quantity that the Walk-in offices requested/used, a Survey or Due-In Report is generated and sent to each location in early spring. The Walk-in office then has the opportunity to review this report and make quantity adjustments (increases or decreases) as needed. The Walk-in office will then mail or fax the Due-In Report back to its regional distribution center. Any changes requested by the office are then sent back to their regional ADC to update the initial order on CAPS.

Another Due-In Report is mailed to each office in the fall. This report will reflect the quantity of each product that office will receive on the initial shipment of products. This report will reflect any adjustments the Walk-in office had made to the spring Due-In Report.

Full carton quantities are then shipped to the Walk-in offices directly from the print contractors based on ok-to-print date. The print analyst is responsible for notifying CAPS technical staff for generation of tapes sent to the print contractors for full carton orders. A file is then cut from CAPS and sent to CIDS to distribute the partial carton quantities from the Distribution Centers.

All additional orders/reorders are entered on CIDS and distributed by the ADCs. If a product is added that is to be distributed to all the Posts of Duty, that product is loaded into CAPS and then transmitted to CIDS. Information on the total number and type of product shipped to a Walk-in office during a tax season is accumulated on CIDS and is eventually fed back to CAPS. This information is used by TFMAP for statistical analysis and to generate the spring Due-In Report.

2.0 <u>SECURITY</u>

The Posts of Duty application is used by personnel at the National Office and at the Area Distribution Centers, including ADC Logistics Analysts, ADC Order Entry personnel, Print Specialists, and Tax Forms Marketing and Analysis Program (TFMAP).

The program is overseen by the Program Analyst for POD.

Users must have a valid CAPS User ID in order to access the POD application. Certain functions, such as the capability to delete records, are limited to individuals with restricted security levels.

Staff who feel that they need greater access must have their supervisors submit a written request, to the Application Owner, detailing the reasons why that user needs to obtain higher access.

3.0   MAIN MENU SCREEN

From a blank screen in the Computer Assisted Publication System (CAPS), type PODPROD. This will bring you to the CAPS POD Main Menu screen. From this screen, you will have two options. You can perform database maintenance (Option #1), or else you can run reports using the information in the database (Option #2).

Pressing PF3 will exit the POD application entirely and return you to a blank CAPS screen.

```
_____

PO              COMPUTER ASSISTED PUBLICATION SYSTEM
                          POD Main Menu
 -------------------------------------------------------------------------

  1 Maintenance
  2 Reports




 Option ==> __

 01=             02=             03=end          04=CMS          05=             06=
 07=             08=             09=             10=             11=             12=
```

3.1 POD AUXILIARY DISTRIBUTION SYSTEM - MAIN MENU

Selecting Option #1, Maintenance, from the POD Main Menu will bring you to the POD Auxiliary Distribution System Main Menu.

You must know the customer's office number in order to select Function #1 or #2. There is no Search option for this Menu.

The Order Point Code -- 6699 -- is hard-programmed into the system. All Posts of Duty account numbers have this number as part of their codes.

Press PF3 to return to the POD Main Menu.

_____

```
PO00M001                        Post of Duty
                   Auxiliary Distribution System - Main Menu



                 Enter Function ===>  __

        Enter Customer Account Number ===>  _____  - 6699




           +-----------------------------------------------------------+
           |  Functions ====> 1 = POD Address Entry                    |
           |                  2 = POD Order Entry/Change               |
           |                  3 = Utility File                         |
           |                                                           |
           +-----------------------------------------------------------+
```

3.1.1 <u>POD ADDRESS INFORMATION SCREEN</u>

Selecting Function #1 from the POD Auxiliary Distribution System Main Menu and entering the Office number will bring you to the POD Address Information screen, shown below.

If you are filling in any blank fields that were formerly empty, you will need to press PF2 to ADD the information.

If you make any changes to the existing information, you must press PF6 in order for the revisions to be SAVED.

Press PF4 to see a list of the items that are scheduled to be automatically shipped to the office whose information is shown in the current screen. (This is the same as selecting Option #2, POD Order Entry/Change, from the POD Auxiliary Distribution System Main Menu.)

Pressing PF3 will take you back to the POD Auxiliary Distribution System Main Menu.

_____

```
PO10MAP                       POD Aux Mail Out System
                                POD Address Information

  CAF Information:

    Office: 10100  Order Pt: 6699            Status: A
         Title: IRS/LOS ANGELES OFFICE
  Attention 1: W&I TAX FORM WALK-IN RM 4337
  Attention 2:
  Building: 10004
        Street: 300 N. LOS ANGELES ST
          City: LOS ANGELES                    State: CA  Zip: 90012 - 3363

  POD Information:

        Status: A   Center: W   Bid Area: W   Due-in-Date:
           Inside Delivery: N     Pallets: Y     Open Date: _____
                 Hours Open: 8:00-4:00 M-F_____
          Last Update Date: 2000-05-05     Last User Id: DORENE


  ----------------------------------------------------------------------CAPS---
  Enter=Search Account, PF2=ADD, PF3=End, PF4=Orders, PF6=Update Address
```

3.1.2 POD ORDER ENTRY / CHANGE

To enter a new order, or to change a current order which has not been shipped, select Function #2 from the POD Auxiliary Distribution System Main Menu. You will need to enter the correct Office number in order to make use of this function. Function #2 will bring you to the POD Due-In Order Information screen.

This screen shows all of the documents that this customer has requested be sent at the beginning of the tax-filing season. Each office is surveyed in the spring to update any item and/or quantity changes.

If there is more than one page to the list of items, use PF8 to scroll down to the next page. Use PF7 to scroll back to the previous page.

Pressing PF10 will take you to the POD Update Item File Utility screen. This screen also performs the same function as selecting Function #3 from the POD Auxiliary Distribution System Main Menu.

Press PF3 to return to the Posts of Duty Auxiliary Distribution Main Menu screen.

_____

```
PO20M002                      Post of Duty
                         Due-In Order Information
  Order Point: 10100  - 6699  Name: IRS/LOS ANGELES OFFICE
 Number of Items: 230                  Current Page Number: 1   of  17
 Catalog Search: _____
 Add/ Catalog Amount  Amount   Shipped  Cids            Form           Print
 Chg  Number  Ordered Shipped   Date    Y/N             Name            Seq
      16055N  1100                            F SS-4                     10
      10134D  2800                            F W-2                      20
      25979S  660                             I W-2 & W-3                35
      61437D  50                              F W-2 C                    40
      10159Y  3000                            F W-3                      70
      10164R  50                              F W-3 C                    80
      10220Q  3000                            F W-4                      90
      10225T  50                              F W-4 P                   100
      22891V  50                              F W-4 V                   110
      10227P  50                              F W-5                     120
      10229L  3000                            F W-7                     130
      23117S  4500                            F W-7 SP                  140
      10231X  1000                            F W-9                     160
      20479P  1000                            I W-9                     170
                                  MORE
 PF3=Address, PF7=Up, PF8=Down, PF10=Utility File
```

3.1.3 UPDATE ITEM FILE UTILITY

Selecting Function #3 from the POD Auxiliary Distribution System Main Menu and entering the Office number will bring you to the POD Update Item File Utility screen, shown below.

You can also access this screen by pressing PF10 while in the Due-In Order Information screen, which is part of Function #2.

If there is more than one page to the list of items, use PF8 to scroll down to the next page. Use PF7 to scroll back to the previous page.

Press PF3 to return to the POD Auxiliary Distribution Main Menu screen.

```
POUTM001                        Post of Duty
                             Update Item File Utility

  Search    Catalog Number: _____     Status: __            Page:  1 of  39
          Contractor Flag: _____                     No. Items: 460
 Add Catalog                    Item          Carton  Unit            S  C   Prt
 Chg  Number  Rev.           Description        Size   Issue    Max    T  F   Seq
     16055N  200004  F SS-4                      1500    25    99999    A       10
     10134D  200100  F W-2                        700    25    99999    A  C    20
     25979S  200100  I W-2 & W-3                  660    25    99999    A  C    35
     61437D  199901  F W-2 C                      700    25   999999    A  C    40
     10138V  200100  F W-2 G                      700    25    99999    A       50
     10159Y  200100  F W-3                       3000    25    99999    A  C    70
     10164R  199901  F W-3 C                     3000    25   999999    A       80
     25978H  199901  I W-2 C & W-3 C             2000    25    99999    A       81
     10220Q  200200  F W-4                       3000    25    99999    A  C    90
     10225T  200200  F W-4 P                     1500    25    99999    A      100
     22891V  199910  F W-4 V                     3000    25   999999    A      110
     10227P  200200  F W-5                       1500    25    99999    A      120
                                     MORE
-------------------------------------------------------------------------CAPS-
01=Help      02=         03=End      04=          05=          06=
07=Backward  08=Forward  09=         10=          11=          12=
```

3.2 POD REPORT MENU SCREEN

Selecting Option #2, Reports, from the POD Main Menu, will bring you to the POD Report Menu screen.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access or print any reports that you have saved to your Reader List.

Press PF3 to return to the POD Main Menu.

_____

```
POR00            COMPUTER ASSISTED PUBLICATION SYSTEM
                        POD Report Menu
 ----------------------------------------------------------------------

  1 Product Total Usage Report
  2 Contractor Product Total Usage Report
  3 CIDS Product Total Usage Report
  4 POD Office Address Report
  5 POD Product-Office Summary Report
  6 Tax Forms Redistribution Program Due-In Report




 Option ==> ___

 01=           02=           03=end        04=CMS        05=           06=
 07=           08=           09=           10=           11=           12=
```

3.2.1 **PRODUCT TOTAL USAGE REPORT**

Choosing Option #1, Product Total Usage Report, from the POD Report Menu will bring you to the POD Total Usage Report screen, shown below.

Fill in each of the fields for which you are seeking information. If you leave a field blank, CAPS will automatically assume that you are looking for all possible items in that category, and will respond accordingly. When you have filled in all of the fields, press Enter. The report may take several seconds to run.

The default printer is actually your Reader List, not a printer. To change printers, you must know the correct printer ID for your targeted destination. Fill that in on the Printer ID line.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access the report that you have just saved to your Reader List.

Press PF3 to return to the POD Report Menu.

```
_____

PO00R100        COMPUTER ASSISTED PUBLICATION SYSTEM
                    POD Total Usage Report
 -----------------------------------------------------------------------------
 Sequence by Item Description

 Selection:

 Catalog Number Range:   ===>    _____ - _____
       OR
 Individual Catalog Numbers:    _____   _____   _____   _____   _____
                                _____   _____   _____   _____   _____
 (Leave Blank for All Products)

 Office Range:           ===>    _____ - _____

 Center:                 ===>    __          (R - Richmond   B - Bloomington
                                              S - Sacramento)

 Printer ID              ===>  USER          (Default USER = Reader List)


 01=            02=          03=end      04=CMS        05=           06=
 07=            08=          09=         10=           11=           12=
```

3.2.2 <u>CONTRACTOR PRODUCT TOTAL USAGE REPORT</u>

Choosing Option #2 from the POD Report Menu will bring you to the Contractor Product Total Usage Report screen, which is shown below.

Fill in each of the fields for which you are seeking information. If you leave a field blank, CAPS will automatically assume that you are looking for all possible items in that category, and will respond accordingly. When you have filled in all of the fields, press Enter. The report may take several seconds to run.

The default printer is actually your Reader List, not a printer. To change printers, you must know the correct printer ID for your targeted destination. Fill that in on the Printer ID line.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access the report that you have just saved to your Reader List.

Press PF3 to return to the POD Report Menu.

_____

```
PO00R105        COMPUTER ASSISTED PUBLICATION SYSTEM
                  Contractor Total Usage Report
 ----------------------------------------------------------------------------
 Sequence by Item Description

 Selection:

 Catalog Number Range:   ===>  _____  -  _____
       OR
 Individual Catalog Numbers:    _____  _____  _____  _____  _____
                                _____  _____  _____  _____  _____
 (Leave Blank for All Products)

 Office Range:           ===>  _____  -  _____

 Center:                 ===>  __              (R - Richmond   B - Bloomington
                                                S - Sacramento)

 Printer ID              ===>  USER            (Default USER = Reader List)


 01=           02=           03=end    04=CMS       05=          06=
 07=           08=           09=       10=          11=          12=
```

3.2.3 <u>CIDS PRODUCT TOTAL USAGE REPORT</u>

Selecting Option #3 at the POD Report Menu will bring you to the CIDS Total Usage Report Screen, which is shown below. CIDS (the Centralized Inventory and Distribution System) is a nationwide computer-assisted system for the ordering, warehousing, and distribution of IRS printed products.

Fill in each of the fields for which you are seeking information. If you leave a field blank, CAPS will automatically assume that you are looking for all possible items in that category, and will respond accordingly. When you have filled in all of the fields, press Enter. The report may take several seconds to run.

The default printer is actually your Reader List, not a printer. To change printers, you must know the correct printer ID for your targeted destination. Fill that in on the Printer ID line.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access the report that you have just saved to your Reader List.

Press PF3 to return to the POD Report Menu

```
PO00R110        COMPUTER ASSISTED PUBLICATION SYSTEM
                     CIDS Total Usage Report
 -------------------------------------------------------------------------
 Sequence by Item Description

 Selection:

 Catalog Number Range:   ===>  _____ - _____
      OR
 Individual Catalog Numbers:  _____   _____   _____   _____   _____
                              _____   _____   _____   _____   _____
 (Leave Blank for All Products)

 Office Range:           ===>  _____ - _____

 Center:                 ===>  __              (R - Richmond   B - Bloomington
                                                S - Sacramento)

 Printer ID              ===>  USER            (Default USER = Reader List)


 01=          02=          03=end    04=CMS       05=          06=
 07=          08=          09=       10=          11=          12=
```

3.2.4 <u>POD OFFICE ADDRESS REPORT</u>

Selecting Option #4 from the POD Report Menu will bring you to the Office Address Report Screen, shown below.

Fill in each of the fields for which you are seeking information. If you leave a field blank, CAPS will automatically assume that you are looking for all possible items in that category, and will respond accordingly. When you have filled in all of the fields, press Enter. The report may take several seconds to run.

The default printer is actually your Reader List, not a printer. To change printers, you must know the correct printer ID for your targeted destination. Fill that in on the Printer ID line.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access the report that you have just saved to your Reader List.

Press PF3 to return to the POD Report Menu.

_____

```
PO00R115        COMPUTER ASSISTED PUBLICATION SYSTEM
                      Office Address Report
 ----------------------------------------------------------------------
 Selection:                                 (W - Western    M - Midstates
   Region               ===>  __            S - Southeast  N - Northeast
                                            O - National Office)

   Center:              ===>  __            (R - Richmond   B - Bloomington
                                             S - Sacramento)

   Bid Area:            ===>  __            (R - Richmond   B - Bloomington
                                             S - Sacramento)

   Status:              ===>  __            (A - Active     D - Deleted
                                             S - Suspended)

   Order Point Range: ===>  _____  -  _____

 (The default for any field is "all" unless specifically requested.)

   Printer ID:        ===>  USER            (Default USER = Reader List)

 01=            02=            03=End      04=CMS       05=            06=
 07=            08=            09=         10=          11=            12=
```

3.2.5 <u>POD PRODUCT-OFFICE SUMMARY REPORT</u>

Choosing Option #5 from the POD Print Report Menu will bring you to the POD Product Office Summary Report screen, shown below.

Fill in each of the fields for which you are seeking information. If you leave a field blank, CAPS will automatically assume that you are looking for all possible items in that category, and will respond accordingly. When you have filled in all of the fields, press Enter. The report may take several seconds to run.

The default printer is actually your Reader List, not a printer. To change printers, you must know the correct printer ID for your targeted destination. Fill that in on the Printer ID line.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access the report that you have just saved to your Reader List.

Press PF3 to return to the POD Report Menu.

```
PO00R120       COMPUTER ASSISTED PUBLICATION SYSTEM
                  Product Office Summary Report
 -----------------------------------------------------------------------------
 Sequence by Item Description

 Selection:
  Catalog Number Range:    ===>  _____ - _____
     OR
  Individual Catalog Numbers:    _____  _____  _____  _____  _____
                                 _____  _____  _____  _____  _____
   (Leave Blank for All Products)

  Office Range:            ===>  _____ - _____

  Center:                  ===>  __            (R - Richmond  B - Bloomington
                                                S - Sacramento)

  Product Source:          ===>  __            (1 - All   2 - CIDS Products
  (Default is All Sources)                      3 - Contractor Products)

  Printer ID               ===>  USER          (Default USER = Reader List)

 01=          02=          03=end     04=CMS       05=          06=
 07=          08=          09=        10=          11=          12=
```

3.2.6 TAX FORMS REDISTRIBUTION PROGRAM DUE-IN REPORT

Choosing Option #6 from the POD Report Menu will bring you to the Tax Forms Redistribution Program Due-In Report screen, shown below.

Fill in each of the fields for which you are seeking information. If you leave a field blank, CAPS will automatically assume that you are looking for all possible items in that category, and will respond accordingly. When you have filled in all of the fields, press Enter. The report may take several seconds to run.

The default printer is actually your Reader List, not a printer. To change printers, you must know the correct printer ID for your targeted destination. Fill that in on the Printer ID line.

Pressing PF4 will take you to CMS, which allows you to handle administrative and text processing tasks. You will need to use CMS to access the report that you have just saved to your Reader List.

Press PF3 to return to the POD Report Menu.

_____

```
PO00R125        COMPUTER ASSISTED PUBLICATION SYSTEM
                   Tax Forms Redistribution Program
                          Due-In Report
 ----------------------------------------------------------------------
 Selection:

    Report Type:          ===>  __              (S - Spring   F - Fall)


    Order Point Range:  ===>  _____  -  _____

        OR

    Individual Offices: ===>  _____   _____   _____  _____   _____
                              _____   _____   _____  _____   _____

    Center:               ===>  __            (R - Richmond    B - Bloomington
                                                S - Sacramento)

    Printer ID:           ===>  USER          (Default USER = Reader List)


 01=          02=          03=End       04=CMS       05=          06=
 07=          08=          09=          10=          11=          12=
```